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ABSTRACT

Written for college entry-level travel agent training courses, this course outline can also be used for inservice training programs offered by travel agencies. The outline provides information on the work of a travel agent and gives clear statements on what learners must be able to do by the end of their training. Material is divided into eight modules, each of which is based on 5 to 31 skills. Learning tasks are outlined for each skill. Module topics are orientation to the travel industry, communication skills, world tourism geography, office procedures, package tours, air tariffs and ticketing, ancillary services, and skills and services. A skill profile is attached. (YLB)

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ED246298

TRAVEL AGENT COURSE OUTLINE

Developed by

The Hospitality Industry Education Advisory Committee,
the Alliance of Canadian Travel Associations - B. C., and
the Canadian Institutes of Travel Counsellors of
British Columbia

In cooperation with

The Ministry of Education, Province of British Columbia.

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For further information contact:

Co-ordinator; Hospitality, Tourism and Service
Post-Secondary Department
Ministry of Education
7900 Alderbridge Way
Richmond, B.C.
V6X 2A5
Telephone: (604) 270-7877

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V9A 4V1
Telephone: (604) 387-5331

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INTRODUCTION

The Travel Agent Course Outline and the learning materials that accompany it were developed through the cooperation of the Hospitality Industry Education Advisory Committee, the Alliance of Canadian Travel Associations - British Columbia (ACTA-BC), the Canadian Institutes of Travel Counsellors of British Columbia (CITC), and the Post-Secondary Department of the Ministry of Education. The project was initiated by the Education and Training Committee of ACTA. The committee chairperson, Joan Hammond, gave invaluable support throughout the project.

This outline is written for college entry-level travel agent training courses, but it can also be used for in-service training programs offered by travel agencies.

THE DEVELOPMENT PROCESS

Dacum

The program outline was developed using the Dacum process, a systematic model for developing modular training programs. A series of four booklets describing the Dacum process is available from:

Publication Services Branch,
Ministry of Education,
878 Viewfield Road,
Esquimalt, B.C.
V9A 4V1
Telephone: (604) 387-5331

Project Initiation

The Education and Training Committee gave early direction to the project. Committee members actively working with chairperson Joan Hammond were:

Mike Lane, Holiday House
Bill Harrison, Maple Leaf Travel
Jack Hill, Hill Travel
Len Taylor, Global Travel Computer Services Ltd.
Ila Coffey, Keith Cooke & Associates Ltd.
Penny Lucyk, Air New Zealand
Don Swail, B.C. Auto Association
Allan Hendrickson, Holiday Travel

The Ministry of Tourism also participated with the committee in setting directions.

Dacum Workshop and Skill Profile Chart

A two-day Dacum workshop identifying the work performed by travel agents was conducted by Joan Mason and Barb Mitchell, program developers with the Ministry of Education. The following representatives participated in the workshop:

Peter Waite, Japan Air Lines
Geoff Dolman, Air New Zealand
A.D. Irving, CN Rail
Penn Lewis, Vancouver Hotel
Ila Coffey, Keith Cooke & Associates
Michael Lane, Holiday House
Frank Addison, New Horizon Holidays Ltd.
Peter J. Testemale, CP Air
Joan Hammond, P. Lawson Travel Ltd.
C. Crowther, College of New Caledonia
Ken Dawson, College of New Caledonia
Jorg Stuwe, Air Canada
Herb McManus, New Horizon Holidays Ltd.
Gerry Maguire, Pacific Western Airlines
Eleanor Scott-Iverson, Hagen's Travel Service Ltd.
Penny Dewar, Suntours Ltd.
Penny Lucyk, Air New Zealand
Bob Griffiths, Ministry of Education

The Dacum workshop participants produced the Travel Agent Skill Profile Chart, which listed the essential skills needed by a travel agent on the job. During the following months, the skill profile chart was circulated to representatives throughout the tourism industry for validation.

Program Outline

Once a skill profile chart is approved, the next step is to write a program outline. For each skill on the chart, one or more objectives is written stating what the learner must be able to perform at the end of the training program to demonstrate mastering the skill. A program outline developed using this approach is often referred to as a performance-based or competency-based outline.

Bill Harrison was asked to write the travel agent program outline from the skill profile chart. When he completed the draft of the outline, the steering committee met to review it. Bill incorporated the recommendations made by the committee into the outline.

Learning Materials

After the outline was completed, Veronica Timmons from Training Associates Ltd. was contracted by the Ministry of Education to prepare learning materials to accompany the program outline. Bill Harrison and Jack Hill from ACTA were resource persons advising on technical matters pertaining to the travel agent industry. Once these materials were prepared, they were field tested in the first travel agent training course offered at a college in B.C. This course was given by Douglas College with Jack Hill as the instructor.

Revisions to the learning materials were made by Jack Hill on the basis of the pilot course at Douglas College and subsequent courses at Okanagan College, Camosun College and Vancouver Community College. Final revisions to the learning materials were compiled by the Hospitality Institute under contract to the Ministry of Education.

The learning materials for domestic air ticketing were prepared by instructors trained to give the Air Canada ticketing course for travel agents. These materials are continually updated as air carrier procedures and policies change.

USE OF PROGRAM OUTLINE

For Instructors

The outline should be used as a guideline for written, oral, and practical testing. Instructors should ensure that upon completion of training each learner can perform every objective listed in the outline. Note that after completion of the course it will take time and experience on the job before a new employee becomes a proficient travel agent. Regular on-the-job monitoring by supervisors can greatly assist the new employee to develop and maintain the skills needed to be a travel agent.

For Learners

The outline provides valuable information on the work of a travel agent and gives clear statements on what learners must be able to do by the end of their training. Therefore, it is recommended that learners have a copy of the outline.

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Module 1

ORIENTATION TO THE TRAVEL INDUSTRY

SKILL 1-1: DESCRIBE THE COMPONENTS OF THE TRAVEL INDUSTRY

LEARNING TASKS:

1. Identify the functions of the different segments of the travel industry:
   - Transportation
   - Accommodation
   - Food services
   - Tourist activities
2. Explain why travel agents do not charge a fee for service:
   - The agents operate as brokers on behalf of the accomodations suppliers, transportation companies, and tour operators.
   - The suppliers pay the agents a commission on sales made.
3. List services that are supplied by a travel agent:
   - A one-stop service for all travel assistance required.
   - Information on travel, including: geography, climate, routing, accommodation, formalities and visas, shopping, exchange rates, etc.
   - Recommendations and information on all carrier services plus the best connections.
   - Assistance with passports, insurance and visas.
4. Describe the services the agency cannot provide to the client:
   a) Agencies do not offer the service of re-issuing tickets because:
      - The agency cannot charge a service fee unless there is a specific agency policy to do so.
      - The re-issuing agent is liable for incorrect fare calculations.
      - The agent must use issuing carrier's ticket stock which may not be available.
      - The tickets may be marked non-endorsable.
      - The tickets may be invalid.

   b) Agencies do not offer the service of booking clients at conventions because:
      - Rooms are non-commissiable.
      - Space is only available through convention organizer.

SKILL 1-1: DESCRIBE THE COMPONENTS OF THE TRAVEL INDUSTRY cont.

LEARNING TASKS:

4. c) Credit cannot be paid to individuals without an established account because:
   - Air tickets are paid for weekly by the agency.
   - All other tickets are only available upon final payment to the supplier.

   d) The agency cannot refund money for tickets purchased on a credit card because:
   - The tickets were not paid for by the agency - only the commission was claimed.
   - The credit invoice must be made out and sent to the carrier for credit to the client's account.

SKILL 1-2: DESCRIBE THE JOB DUTIES OF A TRAVEL AGENT

LEARNING TASKS:

1. Identify the responsibilities of the travel agent:
   - To the public
   - To the travel industry
   - To the agency
2. List the job duties of travel agents:
   - Project a professional image.
   - Receive the client.
   - Question the client to ascertain his or her needs.
   - Keep up-to-date on products and services.
   - Use travel reference material.
   - Determine and calculate suitable fares.
   - Keep detailed client records.
   - File office material.
   - Contact airlines, hotels, tour companies, and other suppliers and make arrangements through them.
   - Balance accounts and invoice the client correctly.
   - Collect monies owed from the client.
   - Type itineraries, letters and office forms.
   - Suggest purchase of appropriate insurance forms and process them.
   - Arrange rental of cars.
   - Send deposits and final payments to the suppliers.
   - Assist with general housekeeping.

SKILL 1-3: MAINTAIN GOOD RELATIONS WITH WORKING COMPANIONS AND MANAGEMENT

LEARNING TASKS:

1. Describe the responsibilities of the travel agent to his or her employer:
   - Arrive on time.
   - Present a professional appearance.
   - Follow all agency policies and procedures.
   - Notify the employer when absent.
   - Respect the confidentiality of information.
   - Continue to update product knowledge.
   - Give adequate notice on termination.
2. List the responsibilities of the travel agents to his or her working companions:
   - Handle other agents' clients as you would your own.
   - Make sure the office is well staffed at all times.
   - Cooperate and work as a team.
   - Offer your help when you are not busy.
   - Inform others when you are leaving the office.
   - Adhere to office policies.
   - Share housekeeping chores.

SKILL 1-4: DISCUSS REGULATORY BODIES

LEARNING TASKS:

1. State who registers and regulates B.C. Travel Agents.
2. State the major functions of:
   - Alliance of Canadian Travel Associations
   - International Air Transport Association
   - Canadian Institute of Travel Counsellors

SKILL 1-5: INTERPRET AND USE TRAVEL REFERENCE PUBLICATIONS

LEARNING TASKS: 1. Locate and interpret information using indexes, directories and brochures.

SKILL 1-6: KEEP UP-TO-DATE ON LITERATURE AND PRODUCT LINES

LEARNING TASKS:

1. Explain the proper procedures for maintaining a supply of current resource publications:
   a) Note the folders most often used and maintain ample supplies of them.
   b) When folders are received, use re-order cards to obtain adequate stock.
   c) Always stamp "file copy" on own copy of the folder.
   d) Re-order folders using the cards supplied.
   e) Sort and dispose of out-of-date publications. Keep one old copy until new ones arrive.
2. Using the travel folders available, determine what destinations will most suit the B.C. market:
   - List popular destinations with B.C. clients and make sure supplies of folders are available.
3. List the procedures used in keeping up-to-date on media advertisements regarding travel:
   - Read newspaper travel pages.
   - Note advertisements in magazines.
   - Note commercials on T.V. and radio.
4. In a simulated work situation, demonstrate the methods used to keep new literature and product lines available for easy reference:
   - Make a catalogue of key travel product folders and keep it handy at your desk.

Module 2

COMMUNICATION SKILLS

SKILL 2-1: CREATE A GOOD IMAGE

LEARNING TASKS:

1. Describe methods of creating a good personal image:
   - Maintain a high level of personal hygiene.
   - Dress appropriately, according to agency requirements.
   - Act in a pleasant and cheerful manner.
2. Describe methods of creating a good agency image:
   - Keep displays and folder racks current, tidy and readily available.
   - Keep client files and accounting files up-to-date and tidy.
   - Keep desk areas neatly organized.
   - Keep reference materials handy for telephone use.
   - Use good telephone procedures.
   - Greet clients promptly and courteously.
   - Clean the windows and sidewalks.
   - Change the window displays regularly.

SKILL 2-2: APPLY RECEPTION TECHNIQUES

LEARNING TASKS:

1. In a roleplay situation, demonstrate techniques used when greeting a client:
   - Greet the client with cheerfulness and a pleasant smile. Use eye contact.
   - Offer assistance immediately.
   - Listen to the client's questions and comments.
   - Make the customer feel welcome.
   - Promptly determine the type of assistance required and if necessary, refer to a senior agent.
   - Maintain eye contact.
   - Learn and use the client's name.

SKILL 2-3: APPLY QUESTIONING TECHNIQUES

LEARNING TASKS:

1. List the three major categories of possible client travel needs:
   - First class
   - Budget
   - Tourist
2. List three different types of clients:
   - Specific - committed
   - Non-specific
   - Shopping
3. Describe the importance of keeping control of the discussion by the use of questioning techniques:
   - The agent must identify the critical selling factors significant to each client.
   - The agent must ask the questions and not simply wait for ideas to come from the customer.

SKILL 2-4: LISTEN ATTENTIVELY

LEARNING TASKS:

1. Demonstrate active listening techniques and note the importance of using them with clients on the telephone and in the office:
   - Pay attention to what is being said and make reference notes.
   - Keep office distractions to a minimum.
   - Encourage discussion by suggesting specific alternatives.
   - Get reactions to sales point that you make.
   - Encourage discussion with the client about specific travel requirements.
   - Using paraphrasing, determine whether or not what you have said has been received and understood, and what effect it has had on the client.

SKILL 2-5: APPLY BASIC TELEPHONE TECHNIQUES

LEARNING TASKS:

1. In a simulated work situation, demonstrate the procedures to follow in preparation for telephone answering:
   - Answer on 2 rings.
   - Keep telephone within easy reach.
   - Have calendar ready.
   - Have message pad and pens available.
   - Keep all necessary forms and brochures close to the telephone.

2. In a simulated work situation, demonstrate the procedures to follow to make outgoing calls:
   a) Keep a telephone directory of frequently called numbers.
   b) Plan ahead:
      - Make notes on topics to be discussed.
      - Have reference manuals and forms ready.
      - When conversation may be lengthy, ask "Is it convenient for you to talk?"

3. In a simulated work situation, demonstrate how you can make your voice work for you and give a good impression of yourself and your agency:
   - Greet promptly, pleasantly and efficiently and identify yourself and the agency to the caller.
   - Have a welcoming "smile" in your voice.
   - Speak distinctly into the mouthpiece.
   - Be natural, relaxed and attentive.
   - Convince the caller of your courtesy and willingness to serve.
   - Be careful of your language - do not imply impatience, brusqueness or haste.
   - Do not interrupt or argue.
   - Get the caller's name and spell it out.
   - Use the caller's name in your conversation when possible.
   - Show enthusiasm and personal interest in describing the proposed travel plans.

SKILL 2-5 APPLY BASIC TELEPHONE TECHNIQUES - cont.

LEARNING TASKS:

4. Describe the correct procedure for taking a message:
   a) The following information should be recorded:
      - The correctly spelled name of the person calling.
      - The caller's number and extension.
      - The area code if long distance.
      - The message.
      - Any action requested or promised.
5. Explain the importance of letting the office know when you will be away from the phone and for how long, so that:
   - Proper messages can be taken.
   - Assistance can be given to the client in your absence.
6. Explain how to answer a call for another consultant in the agency:
   a) If the consultant is busy or on another telephone, ask if the client will wait.
   b) Recognize a long distance telephone call.
   c) If the consultant is still busy, ascertain how urgent the call is:
      - Offer assistance - "Can I help you?"
      - Take a message, recording date and time and read it back to the client.
      - Put the client on hold and come back.
   d) If the consultant is out of the office, advise when he or she will return and offer assistance or take a message.
   e) Never say where the consultant has gone. If the consultant is out of the office for a few days, say who takes his or her calls.
   f) Use the "multi-call" telephone system without losing the caller.
   g) Call back.
   h) Say, "Long distance calling."
   i) Try to describe the proposed trip as if "painting a picture" with words.
   j) Listen carefully to the customer's comments.
   k) Do not flood the prospect with too much information.

Module 3

WORLD TOURISM GEOGRAPHY

SKILL 3-1: **IDENTIFY AND LOCATE MAJOR CITIES**

LEARNING TASKS:

1. Given a map of North American countries and a list of major cities, correctly locate these cities on the map.
2. Determine the three letter code for each city.
3. Given a world map, identify and locate countries correctly.
4. Identify and locate major destination cities on a world map.
5. Determine the three letter code for each city.

SKILL 3-2: EXPLAIN GEOGRAPHIC FEATURES

LEARNING TASKS:

1. Present a destination city to the class:
   a) Location
   b) Climate
   c) Population
   d) Capital of country
   e) Names and types of tourist attractions:
      - Cultural
      - Recreational
      - Entertainment
   f) Hotels:
      - Two first class
      - Two tourist class
2. Describe airports and facilities:
   a) Location
   b) Airlines it services
   c) Location from city
   d) Limousine services

SKILL 3-3: DESCRIBE TOURIST ATTRACTIONS

LEARNING TASKS:

1. Given a list of tourist attractions, describe their locations and types of attraction, the types of people who go there, and any other information the visitor would require:
   - Location
   - Types of attraction
   - Types of people who visit
   - Hours of opening/closing
   - Facilities
   - Uniqueness of attraction
2. Present a tourist attraction to the class:
   - "Sell" the attraction.
   - Use visual aids.

SKILL 3-4: IDENTIFY CLIMATIC CONDITIONS

LEARNING TASKS:

1. Given a list of travel itineraries, identify the temperature range at each place during the time of travel.

2. Given a list of travel itineraries, identify whether or not the temperature and humidity will be suitable for a list of suggested activities:
   - Golf
   - Tennis
   - Swimming
   - Sightseeing

3. State the known periods of bad weather for a list of popular destinations:
   - Rainy season
   - Monsoons
   - Typhoons
   - Hurricanes
   - Cold weather

SKILL 3-5: IDENTIFY APPROPRIATE WARDROBES

LEARNING TASKS:

1. Given a list of destinations, identify the climatic conditions which would dictate the type of wardrobe required:
   - Temperature
   - Humidity
   - Rain
   - Snow
2. Identify the local customs that would determine formality of dress:
   a) Resorts:
      - Generally casual
      - In the Caribbean one might require a dinner jacket.
   b) Cities:
      - Semi-formal
      - Jackets, ties
      - A cocktail dress
      - Shoes - feet swell in heat

SKILL 3-6: EXPLAIN CUSTOMS AND EVENTS

LEARNING TASKS:

1. Explain the reasons for checking for special events at a destination during the time when your client will be visiting:
   - The client may wish to attend these events and reservations can be made in advance.
   - Hotels may be booked and the dates of travel should be changed.
   - Stores may be closed preventing shopping.
2. Given the OAG Travel Planner and other travel material, plus a list of destinations, describe the customs and events for each destination.
   - Dates of sporting events.
   - Dates of cultural events.
   - Special holidays not common to British Columbia.
   - Store hours and special dates when the stores are closed.

Module 4

OFFICE PROCEDURES

SKILL 4-1: IDENTIFY OPERATIONAL COSTS AND PROFITS

LEARNING TASKS:

1. Define agency gross sales and gross commissions, and relate them to the gross income of the agency.
2. Describe what is meant by net profit and cash flow.
3. Describe cash flow and implication for ticketing.
4. Discuss the profitability (net profit) of an agency as a percentage of the gross commission (approximately 1 - 1½%).
5. Discuss industry averages for salaries and incentives.
6. Discuss compensation of consultants. Use the 2.5 x gross commissions rate in order to give some idea of what actual compensation for a consultant should be.

SKILL 4-2: CALCULATE CURRENCIES AND EXCHANGE RATES

LEARNING TASKS:

1. Given the bank buying rate for U.S. dollars, calculate Canadian dollars using a calculator:
   - No payment in Canadian funds to U.S.
   - Must exchange.
2. Given the exchange rates listed in the financial pages of your local newspaper, calculate Canadian dollar equivalents for given foreign currencies using a calculator.

SKILL 4-3: DETERMINE AND CALCULATE COMMISSIONS

LEARNING TASKS:

1. Describe the different commission rates for all products:
   - Air (domestic, trans-border, international, charter)
   - Tours
   - Cruises
   - Hotels
   - U-drives
   - Insurance
2. Using a calculator or an adding machine, calculate the commissions for given itineraries.
3. Explain the importance of a good follow-up system for hotel and u-drive commissions:
   - Commission income from hotels and car rentals can be sizeable.
   - Non-payment is usually due to an oversight or carelessness of the hotel's accounting department.
   - Follow-up by sending a copy of the client voucher to the hotel accounting department.

SKILL 4-4: ISSUE RECEIPTS

LEARNING TASKS:

1. Explain why receipts are required for all cash and cheques received:
   - As a record for the client
   - As a record that money has been received by the agency.
2. List the different types of transactions for which receipt or credit would be issued:
   - A refund from suppliers
   - The client pays deposit or interim deposit
   - A final payment
3. Given a standard receipt, fill out all the information required:
   - Name and address
   - Date
   - Amount and currency
   - File code
   - The consultant's name or number
   - Complete details of what the payment is for
   - Recall commission if any

SKILL 4-5: FILE MATERIALS

LEARNING TASKS:

1. Identify the five types of filing systems found in a typical travel office:
   - Client file
   - General correspondence
   - Tariff and reference
   - Accounting
   - Brochures
2. Identify the features a client file system should have:
   - Accurate location
   - Immediate recovery (alphabetical, by date)
   - Efficient use of space
   - Retention of records
   - Follow-up by date
3. Describe how to file general correspondence:
   - In alphabetical order or according to accepted practice in the agency.
4. Identify the special requirements involved in filing tariffs:
   - Easy access due to frequency of use
   - Adequate space
5. Discuss why easy access and quick retrieval are so important in an accounting filing system:
   - It is essential to be able to check the client's account when making final statements for payment.
   - Any questions pertaining to the file can be readily answered.
6. Identify the problems involved with the large volume of travel brochures received in a travel agency:
   - Must be stamped and filed daily so that up-to-date information is always available.
   - Must be checked to see whether folders are applicable to the market served.
   - Lack of storage dictates that only file copies and not quantities of brochures should be kept on low interest destinations.

SKILL 4-6: MAINTAIN SUPPLIES

LEARNING TASKS:

1. Explain the importance of keeping an adequate stock of all necessary materials:
   - Stationary
   - Business forms
   - Brochures ("tools of the trade")
2. Explain steps to be taken in order to maintain supplies.
   - Notify individual responsible for ordering new supplies when stock is getting low.

SKILL 4-7: COMPLETE INVOICES

LEARNING TASKS:

1. Explain the reasons for an invoice or statement as it relates to services provided to the client:
   - List what services will be supplied to the client.
   - Serves as a check for additional services that could be supplied.
   - Provides a record of services paid for by the client.
2. Explain the importance to accounting that invoices be issued in one currency only:
   - Check for correct costing of all charges.
   - Exchange charges could be forgotten.
   - Avoids confusion if refunds are to be issued.
3. Given a standard invoice, be able to fill in the information correctly:
   - Name and address
   - Consultant name or number
   - File code and destination
   - Date
   - Numbers of all tickets and insurance policies
   - Correct fares and totals
   - Credit for all deposits
   - In one currency only
   - Method of payment (cheque, cash, credit card, account)

SKILL 4-8: COMPLETE BANK DEPOSITS

LEARNING TASKS:

1. Given a bank deposit book, complete a daily bank deposit procedure:
   - List all cheques and cash received and total them.
   - Balance the deposit with invoices and receipts and with deposit report if required.

SKILL 4-9: SEND CHEQUES TO SUPPLIERS

LEARNING TASKS: 1. Given a standard cheque, fill in all the information correctly:

- Make sure the cheque shows enough details to be be self-explanatory.
- Amount of cheque figures and letters
- Correct address of supplier
- Proper currency
- Correct client reference showing client name, dates of departure, name of tour, cruise, hotel, etc.
- Details of payment
- Correct commisison deducted
- Deposit already paid is deducted
- Net amount balances with supplier invoice
- Date of departure

SKILL 4-10: BALANCE ACCOUNTS

LEARNING TASKS:

1. Given a reconciliation list to be attached to the client, file and issue a final invoice or statement. The list should include:
   - Deposit(s) paid by client
   - Payments to suppliers
   - Communications charges
   - Exchange charges
   - All costs incurred regarding transportation,
   - Insurance charges
   - Final balance due
2. Describe the consultant's accounting responsibility to the client and agency:
   - Must charge and collect money due from the client.
   - Charges must be correct with no under or over charges.
   - Currency conversion must be calculated accurately at up-to-date exchange rates.

SKILL 4-11: ISSUE RECEIPTS FOR REFUNDS

LEARNING TASKS:

1. Identify the reason that receipts must be closely checked to determine if money received is a supplier refund. If it is a supplier refund, identify what if any recall commission is involved:
   - The receipt could be posted to commission revenue, and not credited to the client's account.
2. Identify gross and net refunds:
   - The client should always be credited with the gross amount (net plus recall commission).
   - Net refund is the amount sent to the supplier less commission.
   - Gross amount is the amount that the client paid.
3. Explain when a credit note or a refund cheque should be issued:
   - Credit notes should be issued to a commercial account when the account pays a statement or a group of invoices.
   - Credit notes should not be sent to the client. If the invoice is not paid, the client could make credit without paying the invoice.
   - The cheque could be sent for vacation travel and where requested by a commercial account.
   - Never issue a refund until the supplier cheque is received.

SKILL 4-12: TYPE ITINERARY

LEARNING TASKS: 1. Given a client reservation, be able to write up an itinerary, including:

- Name and address
- Consultant name or number
- File code or date
- All travel details

SKILL 4-13: ORGANIZE WORK PRIORITIES

LEARNING TASKS:

1. Identify the office duties of a junior travel agent not already mentioned:
   - Opening and distributing mail.
   - Preparing the bank deposit.
   - Ordering tickets and other supplies.
   - Typing business correspondence.

2. Describe the planning of daily work priorities:
   - Schedule time for critical work listed on your daily calendar including client appointments.
   - Schedule the ticketing work load in order to eliminate last minute rush and allow time for last minute bookings.
   - Schedule future ticketing in order to comply with airline reporting dates.
   - Record on your daily diary when deposits are due and arrange to have payments reach suppliers by due date.
   - Complete all reservations requests immediately.
   - Regularly check any reservations still on request (record for follow-up).

3. Describe the procedures that will assist the agent to determine client travel needs quickly and effectively:
   - Keep the work area organized with key reference materials readily accessible.
   - Use questioning techniques to quickly determine the clietn's specific travel plans.
   - Confine discussions to travel requirements.

4. Describe the procedures that will assist the agent tc confirm travel arrangements quickly:
   - Contact the supplier while the client is present in order to determine whether dates and specific requirements are available.
   - Quote costs of transportation and accommodation and get the client's approval at the time of booking.
   - Ask for deposits at the time of booking.
   - Explain final payment requirements giving a statement of complete costs and due dates.
   - Complete the itenerary showing dates and times of travel at the time of initial booking.

SKILL 4-14: PROCESS THE MAIL

LEARNING TASKS: 1. List the procedures used to process incoming and outgoing mail:

- Sort the incoming mail
- Date stamp the mail
- Stamp brochures
- Distribute mail
- Address envelopes
- Use scales
- Use postage meter
- Use postage chart
- Register mail
- Send mail express

SKILL 4-15: MAINTAIN TICKET SECURITY AND REORDER STOCKS

LEARNING TASKS:

1. Identify the steps to be taken in order to provide ticket security:
   - Check and record new tickets to see if any numbers are missing.
   - Do not keep an excess number of tickets in stock.
   - Lock the validator and plates in the safe when the office is closed.
   - Do not leave validated tickets on your desk overnight.
2. Identify the procedure for reordering tickets from airline carriers:
   - Call airline representatives.
3. Describe the procedures to use when purchasing travel products from other suppliers:
   - Outline special procedures and formats required by the different suppliers for reservations and credit card transmittals.

SKILL 4-16: COMPOSE AND TYPE BUSINESS CORRESPONDENCE

LEARNING TASKS:

1. Type itineraries:
   - Flight details
   - Hotels
   - Tours
   - General information
2. Compose and type standard business correspondence:
   - Letter to clients
   - Requests for reservations
   - Requests for information
3. Type business forms:
   - Cheques
   - Hotel and car vouchers
4. Demonstrate typing skills (approximately 25 w.p.m.)
   - Stress accuracy and neatness

Module 5

AIR TARIFFS AND TICKETING

SKILL 5-1: **INTREPRET AIRLINE TERMINOLOGY**

LEARNING TASKS:

1. Given a list of airline terminology used in domestic and international travel define terms correctly.

2. Define types of IATA journeys:
   - Domestic
   - Transatlantic
   - Transpacific
   - Western hemisphere
   - Eastern hemisphere

SKILL 5-2: INTERPRET AIRLINE SERVICES

LEARNING TASKS: 1. Identify airlines:

a) Major airlines serving domestic and international areas.

b) Off-line carriers with offices in Vancouver and areas, both domestic and international, served by them.

SKILL 5-3: **EXPLAIN TYPES OF AIRPLANES**

LEARNING TASKS:

1. Given North American O.A.G. and World Wide O.A.G. and a list of selected itineraries, compare the major types of aircraft used on each itinerary (short, medium and long range, wide body and standard) on the basis of:
   - Seating capacity
   - Engine placement
   - Seating plan
2. Explain types of airline services available to client:
   - First class
   - Economy
   - Business class

SKILL 5-4: **EXPLAIN AIRPORT FACILITIES**

LEARNING TASKS:

1. Given the O.A.G. Travel Planner, describe airport facilities for a list of airports, including:
   - Location of airline gates in the airport terminal
   - Distance airport is from city
   - Limousine fare
   - Limousine service to surrounding communities
   - Availability of U-drives
   - Hotel facilities available at the terminal or nearby

SKILL 5-5: IDENTIFY CITY AND AIRPORT CODES

LEARNING TASKS:

1. Given a map of Canada and a list of Canadian cities, mark the airline code for each city in the correct location on the map.

2. Given a map of the United States and a list of American cities, mark the airline code for each city in the correct location on the map.

3. Given a world map and a list of major destinations, mark the airline code for each city in the correct location on the map.

SKILL 5-6: USE 24-HOUR TIME SYSTEM

LEARNING TASKS:

1. Calculate times using the 24-hour system:
   a) Demonstrate how hours and minutes are shown in the 24-hour clock system.
   b) Convert from 24 hour clock to a.m. and p.m.
   c) Convert a.m. and p.m. to 24-hour clock.
2. Calculate times in different time zones:
   a) Identify the five different time zones in North America.
   b) Using the world wide edition of the O.A.G., relate times of destinations to Greenwich time (GMT) and equivalent British Columbia times.
3. Explain elapsed time to customers:
   a) Using the local destination times shown in the O.A.G., calculate the elapsed or total time taken to make a journey between Vancouver and the destination city on a given series of flights.
   b) Calculate what time would be if flight makes a stop en route.

SKILL 5-7: READ PASSENGER TIMETABLE

LEARNING TASKS:

1. Explain the use of passenger timetable to client, including explanation of all codes.

SKILL 5-8: USE OFFICIAL AIRLINE GUIDE (NORTH AMERICAN EDITION)

LEARNING TASKS:

1. Using the North American Edition (NAOAG), prepare passenger flight itineraries.
2. Using NAOAG or WWOAG, correctly answer passenger's questions concerning flight frequencies, fares, number and location of stops, class of service, meals, equipment types and ground transportation world wide.
3. Using NAOAG or WWOAG, advise passengers of correct airport departure and of arrival if a city is a multiple-airport city.
4. Determine minimum time required between flights in a connecting city.
5. Determine minimum connecting times between airports in multiple-airport cities.
6. Using WWOAG, advise passengers of customs regulations, Visa and immunization requirements.
7. Explain airline rules governing the carriage of unaccompanied children.

SKILL 5-9: **SELECT ITINERARIES**

LEARNING TASKS:

1. Given an itinerary of Canada, U.S., and international destinations, select an itinerary based on customer preference, carrier times and special needs.

2. Describe special planning that must be done when an itinerary involves a city with more than one airport:

   - Use airport closest to the client's ultimate destination.
   - Connecting flights should be at the same airport whenever possible.
   - If connecting flights are at different airports, advise client on: transfer time, types of transfers available, exact airports he will use on arrival and departure, departure flight from a different airport than arrival airport.

SKILL 5-10: EXPLAIN AIRLINE COMPUTER RESERVATION SYSTEM

LEARNING TASKS:

1. Describe which types of requests can be made through each airline's computer reservation system.

SKILL 5-11: UPDATE TARIFFS AND SCHEDULES

LEARNING TASKS:

1. Explain the liability to the agent and the importance of quoting the correct fare.
2. State the importance of using the current copy of the Aptco Tariff.

SKILL 5-12: CALCULATE FARES

LEARNING TASKS:

1. Identify and construct fares which involve thru, sector and joint fares.
2. Given an itinerary which includes sector, thru, and joint fares and the applicable tariffs, price the itinerary and check routing.
3. Calculate special fares, e.g. APEX, CCF, Excursion, for various itineraries.
4. Determine the correct fare for children, accompanied by a parent, and unaccompanied.
5. Given the air tariff and current exchange rates, quote fares in Canadian dollars.

SKILL 5-13: **EXPLAIN AIRLINE TAXES**

LEARNING TASKS:

1. Explain what taxes are charged on air travel in Canada and U.S.
2. Explain what taxes are charged on international flights.

SKILL 5-14: MAKE RESERVATIONS WITH CARRIERS

LEARNING TASKS:

1. Identify reservations procedures as established by airlines and role play making a reservation giving information in the correct sequence.

2. Role play making reservations to comply with rules governing special fares, e.g. APEX, CCF, Excursion.

SKILL 5-15: ISSUE TICKETS

LEARNING TASKS:

1. Explain why standards and accurate entries on a ticket are essential:
   - To provide efficient service to the client, ticket agents must be able to handle tickets issued by others.
   - For easy accounting, clear and accurate entries are required.
   - Must be complete and understandable in any language in order to determine fare adjustments when travel plans change.
2. Identify the parts of an airline ticket and explain their functions.
3. Using the information calculated to determine appropriate fare structure, write the ticket correctly according to IATA/ATA ticketing procedures for single, conjunction and group tickets, ensuring that:
   - Ticket is validated with correct CIP.
   - All blocks are completed.
   - Proper form of payment is shown.
   - Appropriate audit offices and void coupons are removed.

SKILL 5-16: EXPLAIN BAGGAGE REGULATIONS AND PROCEDURES

LEARNING TASKS:

1. Explain baggage regulations on air travel for various itineraries involving major and regional carriers:
   - Explain the system of baggage allowance and what size restrictions there are.
   - Explain the restrictions involved with carry-on luggage.
   - Explain when carriers apply the piece allowance and when weight allowance is applied.
   - Explain how excess baggage charges are calculated for piece and weight allowances.
   - Compare baggage allowances for first class versus economy.

SKILL 5-17: REISSUE TICKET

LEARNING TASKS:
1. Describe when an agent can reissue a ticket.
2. Explain the procedures for reissuing tickets.

SKILL 5-18: REFUND TICKETS

LEARNING TASKS: 1. Describe all procedures to follow when a ticket is refunded by an agent.

SKILL 5-19: ISSUE M.C.O.'S

LEARNING TASKS:

1. Explain procedures for issuing Miscellaneous Charge Order's for:
   - Excess baggage collection
   - Unspecified travel
   - Car hire
   - Upgrade air or surface accommodation
   - Prepaid ticket advise (P.T.A.)

Module 6

ANCILLARY SERVICES

SKILL 6-1: DESCRIBE ANCILLARY SERVICES

LEARNING TASKS:

1. List the ancillary services offered by travel agencies:
   - Accommodation
   - Sightseeing
   - Car rental
   - Insurance

SKILL 6-2: IDENTIFY LOCAL BOOKING OUTLETS

LEARNING TASKS:

1. List all reservations numbers, Zenith numbers and Watts numbers for ancillary suppliers in the B.C. area:
   - Accommodation
   - Sightseeing
   - Car rental
   - Insurance
2. Describe how to make a Zenith call and a Watts call.
3. Demonstrate the use of telex to get instant printed confirmation.
4. Describe the advantages and costs involved in Cables/ Reply paid Cables/Nightletters.

SKILL 6-3: INTERPRET ACCOMMODATION TERMINOLOGY

LEARNING TASKS:

1. Given a glossary of hotel terms, explain the meaning of each term.

SKILL 6-4: LOCATE AND INTERPRET HOTEL INFORMATION

LEARNING TASKS:

1. Identify the directories and indexes for hotels:
   - Hotel and travel index
   - Official hotel and resort guide
   - O.A.G. travel planner
   - Automobile club books
   - Mobile oil books
   - Provincial or state tourist publications
   - Hotel chain listings, e.g. Sheraton
2. Using a hotel guide and hotel brochure, list the features of any given hotel:
   - Number and type of rooms
   - Class of hotel
   - Location to airport
   - Location to city center
   - Special features
   - Pool, television
   - Dining facilities
   - Meeting facilities
   - Rate structures
   - Hotel tax charged
3. Using a hotel guide, determine how to make a reservation:
   - Locate information on hotel representatives, local charge number, Watts or Zenith number, telex number, name of manager, address, phone and number.
4. Determine deposit and cancellation policies.

SKILL 6-5: DETERMINE CUSTOMER REQUIREMENTS FOR HOTELS

LEARNING TASKS:

1. List the information needed to make a reservation:
   - Number in group
   - Names of all persons
   - Proposed budget (rate wanted by client)
   - Type of accommodation (number of beds, double, twin, suite, apartment, alternate arrangement)
   - Special requests (kitchenette, view, beach, pool, bath, quiet)
   - Number of nights
   - Arrival date and time (method of arrival, flight number, guaranteed arrival, credit card number required after 6 p.m.)

SKILL 6-6: DETERMINE CONDITIONS OF RESERVATION

LEARNING TASKS:

1. Describe the obligations the client or travel agent has to an hotel when a reservation is guaranteed for arrival:
   - The hotel will hold the room after 6 p.m.
   - The client must cancel if the reservation cannot be used.
   - The hotel will bill the client for the room if the client or travel agent does not cancel within a set time.
   - Credit card can be used.
2. Detail hotel policies on deposits and cancellation charges:
   - The hotel will keep the deposits if a reservation is not cancelled.
   - The hotel reserves the right to keep the deposit if cancellation is not made in sufficient time.
   - At prime times, hotels may require a cancellation notice of two weeks or more.
   - A hotel will automatically cancel a reservation if the deposit is not received by the option dates.
3. Explain the advantages and disadvantages to the client of prepayment:
   - The client knows exactly what his costs will be and does not have to take money to pay the bill at the end of the stay.
   - The client is locked into staying at the prepaid hotel as a refund would be difficult to get.

SKILL 6-7: MAKE A RESERVATION

LEARNING TASKS:

1. Given a description of client requests and appropriate reference materials, outline all procedures to be followed in making reservations for hotels.

SKILL 6-8: EXPLAIN GRATUITIES, TAXES, AND SERVICE CHARGES

LEARNING TASKS:

1. Explain standard procedures concerning service charges:
   - Many resort hotels and hotels in many countries charge a service charge in lieu of gratuities.
   - The client should check, as no further tipping is expected when service charges are made.
   - In some cases, service charges may also be added to bar bills in which case there in no need to tip.
   - In restaurants and bars service charges are often included. Advise the client to check the menu.
2. Explain standard procedures concerning tipping:
   - When a service charge is not included, tipping of all service personnel is standard practice. Look at the menu and hotel tariff.
   - Identify the recommended gratuities for:
     - A waiter or waitress
     - A porter

SKILL 6-9: FINALIZE HOTEL RESERVATIONS

LEARNING TASKS:

1. Explain the procedures to finalize a hotel reservation:
   - Make a reservation with the supplier.
   - Collect and send a deposit and/or the final payment.
   - Issue the client a voucher detailing the services to be performed and what price was paid.
2. Explain the importance of getting a confirmation document from the supplier:
   - The supplier will accept his own document readily.
   - The client may have trouble with the agency voucher if no proof of payment from the supplier is included.

SKILL 6-10: FOLLOW-UP ON HOTEL COMMISSIONS DUE

LEARNING TASKS:

1. Explain the importance of a good follow-up system for hotel commissions:
   - A commission income from hotels can be sizeable.
   - Non-payment is usually due to oversight or carelessness on the part of the hotel's accounting department.
   - A follow-up with a copy of the client's voucher should be sent to the hotel accounting department.

SKILL 6-11: **INTERPRET SIGHTSEEING TERMINOLOGY**

LEARNING TASKS:

1. Explain the difference between rates quoted gross and net:
   - Gross rates include a commission for the travel agent.
   - Net rates require an added commission.
2. Explain why per person costs vary when sightseeing or transfers are by private car:
   - The price is based on sole use of the car, therefore the cost is divided by the number of passengers.
3. Explain the term "sightseeing tour":
   - Hours of sightseeing by bus or limousine with a tour conductor.
4. Describe the features of a sightseeing tour:
   - Normally a half day but can be all day or several days, an evening dinner or a nightclub tour.
   - Visits major points of interests in a city or the surrounding area, e.g. historic sites, museums, parks, residential and shopping sections.
5. Explain the advantages of taking a sightseeing tour:
   - An excellent way to "get the feel" of a new city.
   - Choose places to spend more time on own.
   - A way to meet new people.
   - Provides tours in English.
6. Discuss the type of client who might take a sightseeing tour:
   - First time visitors
   - A business traveller with time to spare
   - Clients wanting to learn about the places they visit
   - Single clients desiring companionship for dinner and nightlife
   - Foreign visitors, e.g. a Canadian in Mexico

SKILL 6-12: DETERMINE CUSTOMER REQUIREMENTS FOR SIGHTSEEING TOURS

LEARNING TASKS:

1. List the different types of airport transfers available:
   - Private car or motorcoach from airport to hotel
   - Seat in motorcoach from airport to downtown terminal

2. Explain the different types of sightseeing tours available:
   a) A private car includes:
      - Pick up at hotel
      - A customized itinerary
      - A higher cost
   b) A seat in a motorcoach includes:
      - Pick up at depot or hotel
      - A standard tour itinerary
      - A less expensive cost
      - Being part of a group

3. Explain the advantages to the client when reservations are made in advance for tours and special events:
   - The client has a confirmed seat and can plan an itinerary accordingly.
   - Last minute inconveniences, i.e. trying to make reservations, are eliminated.

SKILL 6-13: LOCATE AND INTERPRET SIGHTSEEING INFORMATION

LEARNING TASKS:

1. List the tariffs that are available for use in quoting sightseeing costs:
   - American sightseeing
   - Grayline
   - Local operator tariffs or brochures
2. Given the above tariffs quote costs and tour information on both city and inter-city tours:
   a) Cost per person
   b) Dates of operation
   c) Time of operation
   d) Pick up points
   e) Local phone contact and address
   f) Features of tours
   g) Transfers (private car or motorcoach)
   h) What is included or not included:
      - Meals
      - Entrance fees
      - Tips and taxes

SKILL 6-14: MAKE SIGHTSEEING TOUR RESERVATIONS

LEARNING TASKS:

1. Given a description of client requests and appropriate reference material, outline all procedures to be followed in making reservations for sightseeing tours:
   a) Make a reservation with the supplier (on voucher).
   b) Collect and send a deposit and/or the final payment.
   c) Deduct the commission from payment.
   d) Make sure there is enough time to receive and confirm the reservation.
   e) Issue the client a voucher detailing the services to be performed and what price was paid.
2. Explain the deposit and prepayment requirements of a sightseeing operator:
   - Payments not forwarded in time may not be received by the tour company and services will not be provided.
3. Explain the reconfirmation requirements for sightseeing tours:
   - Reconfirmation is necessary in order to confirm the tour date, pick up place and time.
   - The operator then has a hotel contact for the client in case of problems.
4. Explain the importance of getting a confirmation document from the supplier:
   - The supplier will accept his own document readily.
   - The client may have trouble with the agency voucher if no proof payment from the supplier is included.

SKILL 6-15: INTERPRET CAR RENTAL TERMINOLOGY

LEARNING TASKS:

1. Explain how car rental firms rate their cars:
   - Cars are rated according to size.
2. Explain the different rates available based on mileage charges:
   - Rate per day or week plus charge per mile
   - Rate per day or week with mileage allowance plus mileage charge above allowance
   - Rate per day or week with unlimited mileage
   - Daily and hourly rates charged
   - Hourly rate is more expensive
3. Explain a collision damage waiver:
   - Cars have a basic insurance with a deductible, usually $200.00, for collision insurance. Payment of the collision damage waiver gives complete collision coverage.
4. Explain what is meant by drop off charges:
   - This is a charge to the client when a car is picked up at one city and left at another. It can be a flat charge or a charge based on time and mileage.
5. Determine the commission rate on car rentals.

SKILL 6-16: DETERMINE CUSTOMER REQUIREMENTS FOR CAR RENTAL

LEARNING TASKS:

1. Explain what factors influence the client's choice of car:
    - Number in group
    - Size of individuals
    - What they presently drive
    - Amount of luggage
    - Number of miles to be driven
    - Time of year governs:
        - Air conditioning
        - Snow tires
    - Preference for standard or automatic shift
    - Length of rental
    - Driver age (limits of minimum and maximum)
    - Cost factor

SKILL 6-17: LOCATE AND INTERPRET CAR RENTAL INFORMATION

LEARNING TASKS:

1. Given the O.A.G. Ground Services Manual or an individual car rental tariff, quote the rates and conditions for car rental:
   - Rates for specific groups of cars and mileage conditions
   - Age requirements
   - Insurance
   - Collision damage waiver
   - Taxes
   - Drop off charges
   - The address and phone number of the station where a car is to be picked up
   - Special features included
   - Extra charges required

SKILL 6-18: MAKE A CAR RENTAL RESERVATION

LEARNING TASKS:

1. Identify car rentals:
   - List car rental companies.
   - Prepare a list of reservation numbers.
2. Describe the services provided to the travel agent by car rental firms:
   - Reservations
   - Assistance with rates
   - Assistance with choice of cars
3. Given a description of client requests and appropriate reference materials, outline all procedures to be followed in making appropriate reservations for car rentals.
   a. Information required to make a reservation:
      - Your agency name and IATA number
      - Your name
      - The client's name and initial
      - Where the car is required and when
      - Client's flight number and arrival time
      - Class of car
      - Type of car
      - Special equipment
      - Advise if the client is under 21

SKILL 6-19: DETERMINE AND EXPLAIN CONDITIONS OF RESERVATIONS

LEARNING TASKS:

1. Explain the advantages to the client of paying for car rental by credit card:
   - Car rental firms do not require a cash deposit on credit card payments
   - Car rental firms will require a substantial down-payment for (cash) payment or may not handle cash at all.
2. Explain what can be prepaid on a car rental:
   - The basic rental rate only
3. List what cannot be prepaid on a car rental:
   - Excess mileage
   - Collision damage waiver
   - Taxes
   - Insurance
   - Gasoline
4. Explain the advantages of checking for wholesaler weekly prepaid car rental rates:
   - The rates are lower than going directly to car rental companies due to bulk purchasing.
5. Explain the importance to the client of checking the car rental contract before signing:
   - The contract may be made out for a higher rate than was quoted.
   - The client will have difficulty when returning the car as he or she will be expected to pay the higher rate.

SKILL 6-20: FINALIZE CAR RENTAL RESERVATIONS

LEARNING TASKS:

1. Explain the procedures used to finalize a reservation for car rentals:
   - Make reservations with supplier.
   - Collect and send a deposit and/or the final payment.
   - Issue the client a voucher detailing the services to be performed and what price was paid.
2. Explain the importance of getting a confirmation document from the supplier:
   - The supplier will accept his own document readily.
   - The client may have trouble with the agency voucher if no proof of payment from the supplier is included.

SKILL 6-21: INTERPRET RAIL TIMETABLES

LEARNING TASKS:

1. Given a VIA transcontinental timetable, identify the correct date and arrival times at destinations across Canada:
   - All times are local, and are shown on a 24 hour clock.
   - Mark the timetable with a line at midnight (24h00) to easily determine days of travel.
2. Given a VIA transcontinental timetable, identify the services available at junction points:
   - Connecting branch line service
   - Other connecting services are AMTRAK, bus, limo
3. Identify from the VIA timetable all baggage regulations:
   - Free allowance
   - Full fare 150 lbs.
   - Half fare 75 lbs.
   - Checked baggage is not carried on all trains but will be handled on the next available train.
   - The baggage liability is $100.00.
   - Custom information for checked and unchecked baggage is located with AMTRAK connecting services.
4. Given a VIA timetable, explain how to find the timetable number for service to the required destination city:
   - The alphabetical station index at the rear of the timetable lists all stations served and gives table numbers.
   - Refer to the table and see if it shows a required origin-destination schedule.
5. Given a VIA timetable showing a short run service between two cities, explain the information provided:
   - Time in 24 hour clock
   - Train number
   - Reference mark definitions appear at the rear of timetable
   - Reference marks show:
     - Type of train
     - Frequency of service
     - Conditional stops

SKILL 6-21: **INTERPRET RAIL TIMETABLES** - cont.

LEARNING TASKS:

6. Given an AMTRAK timetable, explain how to find the timetable page number for service to the required destination city:
   - The alphabetical station index in the front of the timetable will give the number for the schedule.
   - Locate the route line on the centre fold system map, the page number is indicated by the circled number on the route line.
7. Explain how to read an AMTRAK schedule:
   - Service in one direction is shown on the left and in the other direction on the right.
   - If the destination is below the origin read down.
   - Read up if the destination is above the origin.
   - Check the frequency of operation shown below train names.
   - Check symbols for on-board services provided.
   - Summary of symbols appears at the back of the timetable.
8. Explain the reasons for checking system timetable validaty dates:
   - The timetable is published twice a year. It changes when time changes from standard to daylight and reverse.

SKILL 6-22: EXPLAIN RAIL TERMINOLOGY

LEARNING TASKS:

1. Explain the features of equipment previously used on the CNR lines:

   a) Seating accommodation:

      - Coach (70 seats, budget priced, wide reclining seats, picture windows)
      - Daynighter (52 seats, deluxe coach at premium charge, overnight comfort, passengers can use dome car)

   b) Sleeping car services:

      - Section (seats by day, upper and lower berth by night, washroom facilities at end of car, curtain wall at night)
      - Roomette (seat by day, single bed by night, washroom facilities, door entrance)
      - Bedroom (seating for two or more by day, upper and lower beds by night, washroom facilities, some can be adjoining, door entrance)

   c) Food and lounge services:

      - Cafe lounge (table and counter services, used by coach and daynighter passengers, provides menu and beverage service)
      - Sceneramic dome car (between Vancouver and Edmonton only, full length dome including bar in upper level, lower level lounger, for use of daynighter and sleeping car passengers)
      - Club lounge (Edmonton to east, living room type lounge area, separate cocktail lounge)

2. Explain the features of equipment previously used on the CPR lines:

   - Streamlined deluxe coach (60 seats, full-length leg rest, reclining seats, picture windows)
   - Streamlined scenic dome coach coffee-shop car (dome car service available across Canada, 26 seats with full-length leg rest in coach section, 20 seats in coffee-shop, 24 seats in dome)
   - Streamlined sleeping cars
   - Chateau and Manor series (sections, roomettes, bedrooms)
   - Streamlined scenic dome lounge sleeping car

SKILL 6-22: EXPLAIN RAIL TERMINOLOGY - cont.

LEARNING TASKS:

2. . Park series (bedroom, drawing room similar to a bedroom but with 2 lowers and 1 upper lounge and dome)
   . Streamlines deluxe dining room car (capacity 48 seats)

3. Explain the types of special trains available between Toronto and Montreal:
   . Rapido (conventional coach, club car with complimentary meals)
   . Turbo (special high speed train with deluxe equipment)

4. Explain the new AMTRAK AMFLEET trains:
   . Deluxe coaches, fully reclining seats fold down, trays overhead, reading light)
   . Amcafe (for use of coach passengers)
   . Amclub (first class rail, 2 and 1 seating, meal service at seatside)

5. Explain the sleeping accommodations on the long haul AMTRAK trains:
   . They are similar to Canadian trains except there are no sections.
   . Daylighter coaches are available as in Canada.

SKILL 6-23: DETERMINE CUSTOMER REQUIREMENTS

LEARNING TASKS:

1. Using questioning techniques, determine customers needs by finding out the following:
   - Length of trip
   - Purpose of trip
   - Number travelling
   - Budget
   - Coach or daynighter
   - Type of sleeping accommodations

SKILL 6-24: PLAN AN ITINERARY

LEARNING TASKS: 1. List the factors involved in planning an itinerary:

- Departure date
- Stopovers
- Arrival date (accounting for travel time)
- Total time available for trip
- Return date
- Type of accommodation required and available on specific trains
- Excursion or other special fares available
- Baggage requirements (checked, unchecked)

SKILL 6-25: CALCULATE RAIL FARES (BASIC)

LEARNING TASKS:

1. Identify VIA's special incentive fares and explain the conditions of travel:
   - 65 plus
   - Group of three or more (no family plan)
   - Excursions (3 days, 7 - 30 days)
   - Via Rail pass
2. Using a VIA rate schedule, indicate the relative cost of accommodation (e.g. Vancouver - Winnipeg):
   - Coach
   - Daynighter
   - Roomette
   - Bedroom
   - Club car
3. Identify AMTRAK's incentive fares and explain the conditions of travel:
   - Family plan
   - Excursion (5 days, 30 days)
   - AMTRAK Rail pass (unlimited travel over 26,000 miles of track, available in choice of 14, 21, 30 day passes, family passes also available)

SKILL 6-26 MAKE RAIL RESERVATIONS

LEARNING TASKS:

1. Explain the reservations procedures:
   - Give exact details of dates and accommodations as well as acceptable alternates.
   - Note the reservation code.
   - Note the ticketing option date.
   - Call the rail service agent.
2. Explain the importance of ticketing option dates:
   - The rail reservations centre must be advised of ticket and number by the option date or reservations will be cancelled.

SKILL 6-27: WRITE RAIL TICKETS

LEARNING TASKS:

1. When obtaining VIA tickets, identify the ticketing codes required for computer use:
   - Locate the codes in tariff.
   - Write the codes accurately in the computer section of the ticket.
2. List other information required and indicate where it appears on the ticket:
   - Origin
   - Destination
   - Train number
   - Travel date
   - Type of accommodation
   - Reservations code
3. Explain how to obtain AMTRAK tickets:
   - Very limited number of agents have ticket stock.
   - Purchase is made through the general agent.

SKILL 6-28: FINALIZE THE TRANSACTION

LEARNING TASKS: 1. Explain the information which should be checked on tickets:

- Fare
- Travel date
- Car number
- Accommodations
- Train number and time
- Reservations code

SKILL 6-29: DETERMINE CUSTOMER REQUIREMENTS FOR INSURANCE

LEARNING TASKS:

1. Explain the obligation of the travel agent to make the client aware of the travel insurance or protection that is available:
   - The client is exposed to numerous risks during travel.
   - The client's present insurance probably does not cover all risks, or has a maximum pay out.
   - Medical costs are very expensive outside Canada.
   - B.C. medical and hospital insurance protection is limited.
   - Trip cancellation penalties must be covered.
   - Hotel deposits may not be refundable.
   - New airfare rules contain numerous time restrictions that levy penalties if the return trip is advanced or delayed.
   - If the client is not offered insurance, the travel agent can be liable for costs to the client.
2. Explain baggage and personal effects insurance:
   - It covers all risks of loss, theft, damage or mysterious disappearance.
   - Homeowner's or tenant's insurance covers off premises but not all risks.
   - It covers only baggage and personal effects (not household effects, professional equipment, collector's items, art work, contact lenses, teeth, money and documents).
   - There could be a maximum limit for any one item.
3. Explain travel accident insurance:
   - It covers 24 hours a day.
   - It covers all types of accidents for the entire trip.
   - It does not cover sickness or disease.
   - Keep receipts.
   - It covers loss of life, loss of sight or limbs, monthly income, medical expenses.
4. Explain air flight accident insurance:
   - It covers scheduled carriers or charter flights operated by scheduled or intercontinental licensed air carriers.
   - It also covers airport helicopters and airport limousines.
   - Inexpensive premiums are available for flight and limousine coverage.

SKILL 6-29: DETERMINE CUSTOMER REQUIREMENTS FOR INSURANCE - cont.

LEARNING TASKS:

5. Explain hospital and medical expense insurance:
   - It must have valid Canadian policy (provincial).
   - Offers supplementary coverage for any medical expenses not coverd by provincial medical plans.
   - There may be some exclusions due to pre-existing medical conditions.
6. Explain cancellation insurance:
   - It covers the non-refundable portion of travel arrangements.
   - It covers cancellation due to medical reasons of insured or near relatives or travelling companion, jury duty, or quarantine.
   - Rates depend on the type of travel.
   - Some insurance companies will protect the commission.
7. Medical - visitors:
   - Must buy within 72 hours of arrival.
   - Is not valid in U.S.A. - outside Canada (can buy travel insurance in Great Britain).

SKILL 6-30: EXPLAIN CONDITIONS OF INSURANCE TO CLIENT

LEARNING TASKS:

1. In a roleplay situation, using a copy of the insurance policy, review the conditions of insurance with the client:
   - Review policies on: pre-existing illness, age, limit on any one item on baggage insurance, the reimbursement that can be expected in event of a claim, steps to be taken and time limitations in filing a claim, exactly what the insurance covers.
   - Review the policy on extending coverage (must be done before the trip, extension is not possible when out of the country, credit can be issued later if not used, always sell over-time, e.g. if going for 5 days sell for 6).

SKILL 6-31: WRITE INSURANCE POLICY

LEARNING TASKS: 1. Given a standard insurance policy, complete the form outlining all the required information accurately:

- Full name and address
- Beneficiary
- Travel dates
- Number of days
- Origin and destination
- Details of insurance and premiums

Module 7

PACKAGE TOURS

SKILL 7-1: IDENTIFY FUNCTIONS AND SERVICES OF A TOUR OPERATOR

LEARNING TASKS:

1. Identify the functions of a tour operator:
   - Creates and markets escorted, group and charter tours.
   - Performs various tour services or subcontracts at the destination.
2. Identify the services a tour operator provides to agency:
   - Reservations
   - Colourful brochures
   - Sales aids
   - Co-op advertising
3. Locate tour operators in Vancouver:
   - Identify tour operators with offices in Vancouver.
   - Identify the destinations they serve.
   - Prepare a list of reservation numbers.

SKILL 7-2: EXPLAIN TERMINOLOGY AND TYPES OF TOURS

LEARNING TASKS:

1. Define an escorted tour:
   - The client travels with a group which has an escort in attendance at all times to assist with all prepaid travel arrangements. The tour can be budget, first class or deluxe.

2. List the features of an escorted tour:
   - The tour escort assists with local language, customs and currency.
   - The tour escort provides specialized knowledge, does some tipping, pays entrance fees and all other charges, handles tickets and advises on what to see and where to dine.
   - Completely preplanned
   - Value due to bulk buying
   - Prepaid so the actual budget can be determined.
   - The client meets people with similar tastes and interests.

3. Explain the importance to the client of determining where the escort joins the tour:
   - Escorted from departure city
   - Escorted from gateway city
   - Escorted from arrival at first destination
   - Different escort for each destination visited

4. Define an F.I.T. tour:
   - A foreign independent tour has been pre-paid by a client travelling independently in a foreign country.

5. Explain the features of an F.I.T. tour:
   - Freedom of movement
   - Clients can pursue special interests and preferences.
   - Clients select their own forms of transportation and types of hotel.
   - Clients are free of any restrictions imposed by group travel.
   - No cost saving on air travel
   - Preplanning assures clients.
   - Prepaying sets budget required.

SKILL 7-2: EXPLAIN TERMINOLOGY AND TYPES OF TOURS - cont.

LEARNING TASKS:

6. Define a G.I.T. tour:
   - A group inclusive tour uses a special airfare on sheduled airlines. Minimum numbers of passengers are required. Arrangements are fully prepaid with no deviations allowed.

7. Explain the features of a G.I.T. tour:
   - Economical due to lower airfare and bulk purchasing of services.
   - Minimum number required depending on time of year and destination.
   - Arrangements are fully prepaid so that a budget is established.
   - Strict prebooking and ticketing requirements.
   - Always a possibility that the tour will be cancelled due to a lack of passengers.
   - Passengers must travel together on all air flights.
   - Cancellation penalties on air travel.

8. Define an I.T.C. tour:
   - Inclusion tour charter tours use charter aircraft. Tours are completely prepaid and are usually to popular resort destinations for one week or two week stays.

9. Explain the features of an I.T.C. tour:
   - Economical due to charter flights and bulk purchase of hotel rooms.
   - Available at one fixed price.
   - Most are non-stop to destination.
   - No deviation allowed.
   - Only go to popular destinations.
   - There are many departure dates to choose from.
   - Reservations are based on space availability with no government prebooking requirements.
   - Cancellation penalties.

SKILL 7-3 : INTERPRET AND USE TOUR DIRECTORIES AND LITERATURE

LEARNING TASKS:

1. Describe the Consolidated Air Tour Manual (C.A.T.M.)
   - Widely used in industry.
   - Two volumes, all year or seasonal.
   - Enables the agent to sell a large number of tours to almost any city in North America.
   - Published by a consortium of airlines of the Air Traffic Conference of America (A.T.C.).
2. Describe the O.A.G. worldwide tour guide:
   - Lists over 5,000 independent, group and escorted tours by destination, operator, price, itinerary, specific departure date, special interest tours.
3. Describe the Grayline and American sightseeing tariffs:
   - Lists the services and costs of franchised operators.
   - Various cities in North America and other destinations.

SKILL 7-4 : EXPLAIN ADVANTAGES AND DISADVANTAGES OF PACKAGE TOURS

LEARNING TASKS:

1. Explain advantages of packaged tours:
   a) To the client:
      - Completely pre-arranged
      - Ease of purchase (one price)
      - Economical due to bulk buying and charter or group airfares
      - Frequency of operation
   b) To the agency:
      - Easy to sell (one phone call)
      - Minimum of paper work
      - Economical promotion (brochures and ads available, co-op advertising, minimum 10% commission with possible extra over-rides and incentives.
2. Explain the advantages and disadvantages of regular travel:
   a) To the client:
      - Complete freedom of choice
      - Higher cost
      - No cancellation charges
   b) To the agency:
      - In most cases, it requires more time per booking with much lower commisison.
3. Explain the advantages and disadvantages of unpublished tours (foreign and domestic independent tours):
   a) To the client:
      - Completely pre-arranged
      - Known cost in advance of travel
      - Planned to the client's specifications
      - On an extensive tour, the cost could be higher due to service charge and inability to bulk buy.
      - No tour escort
   b) To the agency:
      - Commission on air may increase to 11%.
      - Immediate commission on all prepaid services.

SKILL 7-4: **EXPLAIN ADVANTAGES AND DISADVANTAGES OF PACKAGE TOURS** - cont.

LEARNING TASKS:

4. Explain the advantages of unpublished tours (agency promoted tours):

   a) To the client:

   - Usually special interest
   - Pre-arranged
   - Pre-paid
   - Economical due to bulk purchase and group air
   - Usually escorted

   b) To the agency:

   - A larger gross commission as there is a higher mark up for the agency.
   - The agency has control over space so it can confirm immediately which is particularly valuable for special holidays and high seasons.

SKILL 7-5: DETERMINE CLIENT'S TOUR REQUIREMENTS

LEARNING TASKS:

1. In a roleplay situation, determine client's tour requirements, including:
   - Length of vacation
   - Time of year
   - Destination
   - Budget range
   - Type of tour required
   - Special requirements
   - Purpose of vacation

SKILL 7-6 : CONDUCT A TOUR PRODUCT ANALYSIS

LEARNING TASKS:

1. Using a product analysis checklist, conduct a product study of a particular tour.

   a) Determine:

   - Is the tour approved and what is the IT number.
   - The period of validity.
   - Who is the operator.
   - The reservation and refund policy (widely known through advertisements?)

   b) Price:

   - Fairly priced in relation to included features?
   - How does price compare with other tours?
   - Are included and excluded items clearly noted?
   - Per diem cost as calculated on the number of nights (should be exclusive of airfare)
   - Domestic travel (air, coach or rail) included in tour cost.
   - What portion can be refunded (if not taken, e.g. day excursion)?

   c) Airfare:

   - What airfare is quoted?
   - Group, excursion, normal
   - Restrictions
   - Is the fare quoted correctly and up-to-date?
   - Is the fare from gateway or the client's city?
   - Who is the sponsoring carrier?
   - Does the tour operator hold block seats?
   - Can another airline be used?

   d) Departure dates:

   - When does the tour leave?
   - Where does it leave from?

SKILL 7-6: CONDUCT A TOUR PRODUCT ANALYSIS - cont.

LEARNING TASKS:

1. e) Kind of tour:
   - Fully escorted
   - From gateway
   - On arrival at destination
   - Met in each city or country
   - Entirely independent

   f) Hotels or resorts:
   - Deluxe, first class, second
   - Are private bathrooms specified?
   - Any other facilities included?

   g) Meals:
   - How many meals are included?
   - Breakfasts full or continental?
   - Meals table d'hote (fixed) or a la carte (run of menu)?
   - Are tea and coffee included in meals?
   - Gratuities included?

   h) Itinerary:
   - Are places visited suited to client's interest?
   - Is itinerary too tedious or strenuous?
   - Enough time for rest, shopping, leisure activities?

   i) Terms and conditions:
   - Deposits
   - Final payments
   - Refunds
   - Cancellations

2. Prepare a product analysis catalogue according to destination of current I.T.C. programs operating from Vancouver:
   - Catalogue to show base price, days of operations, period of validity, features included in base price.

SKILL 7-7: RECOMMEND TOURS TO CLIENTS

LEARNING TASKS:

1. In a roleplaying situation, the student will:
   a) Use questioning techniques to determine the client's tour requirements.
   b) Use tour directories, brochures and product analysis information to recommend a tour for the client.

SKILL 7-8: EXPLAIN BOOKING PROCEDURES AND CONDITIONS

LEARNING TASKS:

1. Use the tour product analysis information to discuss booking procedures and conditions with the client, including:
   - Deposit required
   - Option date
   - Cancellation penalties
   - Final payment date
   - Cancellation penalties after final payment is made.
   - Cancellation insurance

SKILL 7-9: BOOK TOUR

LEARNING TASKS:

1. Fill out the tour operator booking form:
   - Make sure that all information is complete and accurate (initials correct, name spelled correctly, address and phone number, passport or I.D. number, tour number, date required).
   - Record the type of accommodation required (single, double, twin, triple, quadruple).

2. Explain the correct booking procedure for:
   a) CATM tours:
      - Book with airline tour desk.
      - Follow the instructions in CATM regarding issuing the M.C.O. for final payment and option date. Advise the airline of the M.C.O. number.
   b) Airline sponsored tour:
      - Book with airline tour desk, or if Zenith, Watts or collect calls are accepted, book direct with the tour operator.
      - Determine how the deposit is to be forwarded (M.C.O. or cheque?).
   c) Tour operator, I.T.C. or A.B.C.
      - Book with the operator using a toll free number or collect.
      - Give complete information.
      - Find out deposit and final payment deadlines.

3. Determine follow-up dates for payment and pickup.
   - Advise the client on the amount of the deposits and final payment, and when they will be due.
   - Set up the client's accounting file.
   - Note the dates for payments and the expected dates for ticket delivery.

Module 8

SKILLS AND SERVICES

SKILL 8-1: APPLY SALES TECHNIQUES FOR DIFFERENT TYPES OF CLIENTS

LEARNING TASKS:

Shopping client

1. Explain the selling techniques that should be emphasized with the "shopping" client:
   - Fare and tour costs must be quoted carefully as the "shopping" client is comparison shopping.
   - Make an effort to close a sale (get the client's name and phone number, offer to make a reservation, attempt to get a deposit if a reservation is made).
2. In a roleplay situation, demonstrate the techniques to be used for a "shopping" client:
   - Apply reception techniques.
   - Determine if the client has "specific" or "non-specific" travel plans, or is an "uncommitted" client.
   - Attempt to close a sale.
   - If no sale is made, be sure the client has your card.
   - Make a note on your calendar for a follow-up.
   - Be prepared to answer clients who insist that lower fares are available elsewhere.

Non-committed client

3. In a roleplay situation, use questioning techniques to determine what actions should be taken in the case of a "non-committed" client:
   - Show courtesy, interest and patience as the prospect could turn into a client.
   - Probe the person's intentions quickly.
   - Efficiently determine whether the person is a prospective client.
   - Determine the extent of the client's travel experience.
   - Determine the extent of the client's knowledge of destination.
   - Suggest alternative travel plans using travel literature.

SKILL 8-1: **APPLY SALES TECHNIQUES FOR DIFFERENT TYPES OF CLIENTS** - cont.

LEARNING TASKS: **Non-specific clients**

4. Define what is meant by a "non-specific" client:
   - Wants to travel.
   - Prepared to travel.
   - Has a budget.
   - Does not know where or how to go, what to do when he or she is there, how much to spend.

5. In a roleplay situation, use questioning techniques to:
   a) Identify any specific requirements "non-specific" clients might have:
      - At what time of year do they want to travel?
      - How long do they have to travel?
      - What type of budget do they have?
      - How many travellers of what ages are involved?
   b) Identify what the "non-specific" client is looking for in the vacation:
      - Sunshine
      - Sightseeing
      - Relaxation
      - Special interest
      - Sports
      - Travel with a "special interest" tour group
   c) Determine the previous travel experience of the "non-specific" client:
      - How many trips?
      - What destinations?
      - Type of accommodation used.
      - Type of transportation and what class.
   d) Identify any special occasions or requirements of the "non-specific" client:
      - Health
      - Honeymoon
      - Anniversary

SKILL 8-1: APPLY SALES TECHNIQUES FOR DIFFERENT TYPES OF CLIENTS - cont.

LEARNING TASKS:

5. d) . Retirement
   . First major trip

   e) Determine if "non-specific" client has any preference to types of transportation:
   . Ship
   . Air
   . Rail
   . Bus

   f) Determine the services the "non-specific" client wants you to perform:
   . Transportation only
   . Transportation and hotel deposits
   . Prepaid travel
   . Escorted tour

Specific needs client

6. List the types of trips that a "specific needs" client would make:
   . Business
   . Travel for family reasons
   . Emergency
   . Travelling with a friend
   . Returning to a destination previously visited
   . Travel to an owned or pre-booked apartment or condominium.
   . Method of payment (credit, cheque, comm. account).

7. In a roleplay situation, use questioning techniques to determine the actions that should be taken for a "specific needs" client:
   . Efficiently obtain all information as to where, when, how, how many.
   . Specific requirements such as meeting dates and pre-booked accommodations should be noted.
   . Check that the client's knowledge and information are correct, e.g. on climate conditions.

SKILL 8-1: **APPLY SALES TECHNIQUES FOR DIFFERENT TYPES OF CLIENTS** - cont.

LEARNING TASKS:

7. . Suggest related services such as car rental and insurance which may have been overlooked.
   . Close the sale remembering the company policy on personal cheques from a new customer (not accepted if personal and the person is leaving immediately).
8. Explain the importance of appropriateness of sales techniques for each client:
   . Test your assumptions.

SKILL 8-2: ADAPT SALES TECHNIQUES FOR DIFFICULT CLIENTS

LEARNING TASKS:

1. Describe the "first class" client.

2. Using folders list the features that make the tour first class:
   - Types of hotels used
   - Types of transportation
   - Number of meals included
   - Number of sightseeing tours included
   - Reputation of tour company
   - Taxes and service charges included
   - Gratuities (included)

3. Identify the features (or lack of them) that make the tour tourist class:
   - Hotels used are tourist class
   - No facilities in the rooms
   - Food is tourist class
   - Probably no elevators
   - No radios or television

4. Identify the "first class" client's special requirements due to age, health or disability and mark them down for special attention:
   - Cannot get into upper berth
   - Cannot climb stairs
   - Need tub
   - Wheelchair
   - Special dietary needs
   - Language
   - Physically handicapped (blind, deaf)

5. List the reasons for upgrading rooms to superior in first class hotels:
   - Better location
   - Less noise
   - Larger rooms

SKILL 8-2: **ADAPT SALES TECHNIQUES FOR DIFFICULT CLIENTS** - cont.

LEARNING TASKS:

6. List the extra services for the "first class" that can be provided by the agency:
   - Car rental
   - Assistance with passports and visas
   - Insurance needs
7. Describe to the "budget independent" client the reference books available listing budget accommodations:
   - Refer to local book stores
   - British travel lists of guest houses
   - Government tourist office list
   - Youth hostels list
8. Explain the services that the "budget independent" client can expect from the agent and what if any service charges are involved:
   - Air, ship or rail reservations where dates are known.
   - Assistance with passport applications; there may be charges for visas.
   - No accommodation reservations for pensions and hostels as they generally do not reply.
9. Explain the advantages of rail passes for the budget client:
   - Unlimited travel for a prescribed time allowing for a fixed budget cost.
   - Overnight trains can be used, reducing accommodation costs.
10. Explain cancellation charges and travel restrictions on budget, charter and special fares:
    - Emphasize that some fares are "space available" and clients should not plan to travel at heavy peak times.
    - The client should budget to have enough money at the end of the trip in case of a delayed departure.
11. List additional health precautions that budget clients might consider:
    - Tetanus and typhoid innoculations
    - Dysentery or malaria pills
    - Polio vaccine

SKILL 8-2: ADAPT SALES TECHNIQUES FOR DIFFICULT CLIENTS - cont.

LEARNING TASKS:

12. Using travel folders showing camping and budget tours, explain the type of accommodations and features to expect on a "budget tour".
    - Sleeping accommodations
    - Pensions, tents, campmobiles
    - Contribution to food kitty and sharing of food preparation duties
    - Sightseeing arrangements
    - Age restrictions
    - Must be prepared to "rough it"
    - Transportation (campmobile, bus)
13. Using travel folders, describe to the client the optional features and supplemental charges of the "budget tour":
    - If available, supplement for single rooms
    - Supplement if not using group air
    - Taxes, tips and service charges
    - Entrance fees
    - Membership fees
    - Bedding and cooking utensils
14. Using the tour booking form, explain the deposit, cancellation and final payment policies of the "budget tour":
    - Trip cancellation insurance included?
    - Health and baggage insurance included?
    - Deposit and final payment deadlines.
15. Identify a "difficult" client or a potentially "difficult" client situation.
16. In a roleplay situation, demonstrate techniques to be used in handling a "difficult" client situation:
    - Empathy
    - Maintain a pleasant attitude
    - Listen carefully and try to determine the specific cause of the difficulty.
    - Answer all questions correctly and efficiently.

SKILL 3-2: **ADAPT SALES TECHNIQUES FOR DIFFICULT CLIENTS** - cont.

LEARNING TASKS:

16. . Try not to show annoyance or frustration.
    . Pass client on to senior people.

17. List possible difficulties that might be caused by clients:
    . Change of reservations.
    . Making last minute bookings, then cancelling.
    . Unable to make up their minds about travel plans.
    . Family problems about travel plans.

SKILL 8-3: HANDLE COMPLAINTS

LEARNING TASKS:

1. In a roleplay situation, demonstrate the procedures to follow when handling a complaint:
   - Avoid interrupting the client's story: listen attentively.
   - Show empathy and establish eye contact.
   - Remain calm and friendly.
   - Avoid blaming someone else but do not admit responsibility before all the facts have been confirmed.
   - Determine if all procedures were followed, e.g. reconfirmation of flights or cancelling of hotels and tours in time.
   - Apologize for the inconvenience.
   - Write an accurate account of all the facts immediately and inform the manager.
   - Promise a quick solution to the problem.
   - Fulfill all commitments as quickly as possible.

2. Upon receipt of the facts of the complaint, determine what office procedures should be followed to get a speedy solution for the following problems:

   a) Complaint due to negligence of the supplier:
      - Have the client write a letter immediately which will be forwarded with a covering letter from the agency (copy sent to the client), asking for a speedy reply.
      - Advise the manager and other consultants of the problem for future reference.
      - Maintain an active follow-up until the problem is resolved.

   b) Complaint due to negligence of the agency:
      - Inform the manager immediately so that action can be taken to satisfy the client.
      - Determine what the client feels his or her expenses were but do not offer to settle until the manager has been consulted.
      - An immediate solution is mandatory, whether it be an apology or a refund.

SKILL 8-3: HANDLE COMPLAINTS - cont.

LEARNING TASKS: 2. c) Complaint due to the supplier not honoring agency vouchers:

- Check to see if a voucher payment was made.
- If payment was made, check to see whether the cheque was cashed.
- If the cheque was not cashed, give the bank a stop payment and refund the client.
- If the cheque was cashed, immediately contact the supplier and ask for a refund.

SKILL 8-4: UPGRADING A SALE

LEARNING TASKS:

1. Explain the benefits of a prepaid tour to the client:
   - The client can carry less money while travelling.
   - It is easier to budget when a trip is prepaid.
   - Special features are included in the tour.
2. State the increased profitability to the agency of prepaid tours:
   - Air commission may be increased.
   - Immediate commission on tour components.
3. Identify the features that would increase the client's enjoyment and pleasure when hotel or cruise accommodations are upgraded:
   - Better location and view
   - Larger room
   - Extra comfort
   - Two beds instead of upper and lower berths
   - Better food and facilities at a higher quality hotel
4. Explain the hazards of underselling:
   - The client is used to and expects more than "bargain basement". No one wants to lower their standards of living on a vacation, most want upgrading.
   - The clients may not come back to the agency because they were undersold and dissatisfied with the vacation.
5. Explain what is meant by "you get what you pay for" when it is applied to hotel accommodation:
   - There is always a reason for minimum price such as noisy location, extremely small accommodation, no facilities in the room, no view.

SKILL 8-5: FOLLOW-UP ON SALES LEADS

LEARNING TASKS:

1. Describe the procedures used to follow-up sales leads with past clients:
   - Give a "thank-you call" when clients refer new business to the agency.
   - Report information on new tours, cruises or other holidays to clients who may be interested.
   - Determine when and where the client next plans to travel.
2. Explain the advantage of film shows and consumer trade shows:
   - The agency sends invitations to clients to attend film shows and consumer trade shows.
   - Stimulates interest and maintains contact.

SKILL 8-6: ESTABLISH A FEEDBACK SYSTEM WITH CLIENTS

LEARNING TASKS:

1. List methods of maintaining a feedback system with clients:
   - Follow-up by calling clients on their return from a major vacation.
   - Send regular mailings on holidays to clients.
   - Invite clients to film shows and consumer trade shows.
2. Explain advantages to the agent and agency of following up clients by calling them on their return:
   - Welcome back
   - Call client after trip is over or follow procedures set by agency.
   - Solicit all comments, both positive and negative.
3. Explain the advantages of follow-up mailings to clients:
   - Cards or letters show the interest of the agency.
   - Assists in retaining the clients for repeat business.

SKILL 8-7: IDENTIFY OPPORTUNITIES FOR CONTINUING EDUCATION

LEARNING TASKS:

1. Identify the availability of airline tariff courses, rail ticket and tariff courses and cruiseline courses:
   - Refer to the schedules of courses offered by airlines, rail companies and cruiselines.
2. Identify the availability of the supplier familiarization trips:
   - Refer to the schedule of trips that are available.
   - List restrictions on familiarization trips.
3. Describe the importance of participating in continuing education through organized seminars and on-the-job updating:
   - Travel is a changing field so you must keep up-to-date.
   - By expanding skills in customer service and travel products, you can improve productivity as a travel agent.
4. Investigate update courses planned in your area:
   - Contact A.C.T.A. - B.C., C.I.T.C. - B.C., A.A.T.A.
   - Read trade publications.

SKILL 8-8: SELL OVER THE TELEPHONE

LEARNING TASKS: 1. List the techniques used to sell over the telephone:

- Ascertain the customer's needs.
- Give information confidently.
- Overcome objections.
- Upgrade a sale.
- Close a sale.
- Speak persuasively.

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TRAVEL AG
SKILL PROFILE

ORIENTATION TO THE TRAVEL INDUSTRY	DESCRIBE THE COMPONENTS OF THE TRAVEL INDUSTRY	DESCRIBE THE JOB DUTIES OF A TRAVEL AGENT	MAINTAIN GOOD RELATIONS WITH CO-WORKRS AND MANAGEMENT	DESCRIBE REGULATORY BODIES	INTERPRET AND USE TRAVEL REFERENCE PUBLICATIONS	KEEP UP-T ON LITER AND PRO LIN
COMMUNICATION SKILLS	CREATE A GOOD IMAGE	APPLY RECEPTION TECHNIQUES	APPLY QUESTIONING TECHNIQUES	LISTEN ACTIVELY	APPLY BASIC TELEPHONE TECHNIQUES	
GEOGRAPHY (NORTH AMERICA)	IDENTIFY AND LOCATE MAJOR NORTH AMERICAN CITIES	EXPLAIN GEOGRAPHIC FEATURES	DESCRIBE TOURIST ATTRACTIONS	IDENTIFY CLIMATIC CONDITIONS	IDENTIFY APPROPRIATE WARDROBES	EXP CUS AI EVE
OFFICE PROCEDURES	IDENTIFY OPERATIONAL COSTS AND PROFITS	CALCULATE CURRENCIES AND EXCHANGE RATES	DETERMINE AND CALCULATE COMMISSIONS	ISSUE RECEIPTS	FILE MATERIAL	MAIN GOOD RE WI SUPP
	ORGANIZE WORK PRIORITIES	PROCESS THE MAIL	MAINTAIN TICKET SECURITY AND RE-ORDER STOCK	COMPOSE AND TYPE BUSINESS CORRESPONDENCE		
DOMESTIC AIR	INTERPRET AIRLINE TERMINOLOGY	INTERPRET AIRLINE SERVICE	DESCRIBE TYPES OF AIRPLANES	DESCRIBE AIRPORT FACILITIES	IDENTIFY CITY CODES AND AIRPORT CODES	L 24- T SY
	CALCULATE SPECIAL FARES	CALCULATE HAWAIIAN COMMON FARES	EXPLAIN AND CALCULATE AIRPORT TAXES	MAKE RESERVATIONS WITH CARRIERS	ISSUE TICKETS	EXP BAG REQU A PROC
ANCILLARY SERVICES	HOTELS	DESCRIBE ANCILLARY SERVICES	IDENTIFY LOCAL BOOKING OUTLETS	INTERPRET ACCOMMODATION TERMINOLOGY	LOCATE AND INTERPRET HOTEL INFORMATION	DET CUS REQU FOR
	SIGHTSEEING	INTERPRET SIGHTSEEING TERMINOLOGY	DETERMINE CUSTOMER REQUIREMENTS FOR SIGHTSEEING TOURS	LOCATE AND INTERPRET SIGHTSEEING INFORMATION	MAKE SIGHTSEEING TOUR RESERVATIONS	CAR
	RAIL AND INSURANCE	INTERPRET RAIL TIMETABLES	EXPLAIN RAIL TERMINOLOGY	DETERMINE CUSTOMER REQUIREMENTS	PLAN AN ITINERARY	CAL RAI (I
PACKAGE TOURS	IDENTIFY FUNCTIONS AND SERVICES OF A TOUR OPERATOR	EXPLAIN TERMINOLOGY AND TYPES OF TOURS	INTERPRET TOUR LITERATURE AND DIRECTORIES	EXPLAIN ADVANTAGES AND DISADVANTAGES OF TOURS	DETERMINE CLIENT'S TOUR REQUIREMENTS	CC A PR AI
SALES AND SERVICE	APPLY SALES TECHNIQUES FOR DIFFERENT TYPES OF CLIENTS	ADAPT SALES TECHNIQUES FOR DIFFICULT CLIENTS	HANDLE COMPLAINTS	UPGRADE A SALE	CLOSE THE SALE	FOL OF I

:L AGENT
)FILE CHART

Developed by:

Program Research and Development
Post Secondary Division
Ministry of Education

KEEP U[illegible]-DATE ON LITERA[illegible]URE AND PRODU[illegible]T LINES						
EXPLAIN CUSTOMS AND EVENTS						
MAINTAIN GOOD RELATIONS WITH SUPPLIERS	COMPLETE INVOICES	COMPLETE BANK DEPOSITS	SEND CHEQUES TO SUPPLIERS	BALANCE ACCOUNTS	ISSUE RECEIPTS FOR REFUNDS	TYPE ITINERARIES
USE 24-HOUR TIME SYSTEM	READ PASSENGER TIMETABLES	USE OVERSEAS AIRLINE GUIDE (NORTH AMERICAN)	SELECT ITINERARIES	EXPLAIN AIRLINE COMPUTER RESERVATION SYSTEM	REVISE AND UPDATE TARIFFS AND SCHEDULES	CALCULATE DOMESTIC FARES
EXPLAIN BAGGAGE REGULATIONS AND PROCEDURES	REISSUE TICKETS	REFUND TICKETS	ISSUE M.C.O.'s	EXPLAIN TICKET PICK-UP AND PAYMENT PROCEDURES		
DETERMINE CUSTOMER REQUIREMENTS FOR HOTELS	DETERMINE CONDITIONS OF HOTEL RESERVATION	MAKE A RESERVATION	EXPLAIN GRATUITIES, TAXES AND SERVICE CHARGES	FINALIZE HOTEL RESERVATION	FOLLOW-UP ON COMMISSIONS DUE	
CAR RENTAL	INTERPRET CAR RENTAL TERMINOLOGY	DETERMINE CUSTOMER REQUIREMENTS FOR CAR RENTAL	LOCATE AND INTERPRET CAR RENTAL INFORMATION	MAKE A CAR RENTAL RESERVATION	DETERMINE AND EXPLAIN CONDITIONS OF CAR RENTAL RESERVATIONS	FINALIZE CAR RENTAL RESERVATIONS
CALCULATE RAIL FARES (BASIC)	MAKE RAIL RESERVATIONS	WRITE RAIL TICKETS	FINALIZE THE TRANSACTION	DETERMINE CUSTOMER REQUIREMENTS FOR INSURANCE	EXPLAIN CONDITIONS OF INSURANCE TO CLIENT	WRITE INSURANCE POLICY
CONDUCT A TOUR PRODUCT ANALYSIS	RECOMMEND TOURS TO CLIENTS	EXPLAIN BOOKING PROCEDURES AND CONDITIONS	BOOK TOUR			
FOLLOW UP ON SALES LEADS	ESTABLISH A FEEDBACK SYSTEM WITH CLIENTS	IDENTIFY OPPORTUNITIES FOR CONTINUING EDUCATION	SELL OVER THE TELEPHONE			

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THE DACUM APPROACH

DACUM is a systematic model of program development used in designing career, technical and vocational training programs. The first step in the process is to establish the skills expected of a graduate entering employment. These skills are generally specified by a representative employer group in a workshop conducted by program development specialists. The product of this activity is a skill profile chart. This chart is then circulated both to the participants and to a number of other employers for review prior to further development.

The next step is to specify learner-centred performance objectives. These include not only the skills a learner must demonstrate but also the conditions under which the skill is to be performed and the criteria used to determine the acceptable standard of performance.

Once the performance objectives have been set, there are three important steps to complete the development process. These are generally undertaken by an instructor or group of instructors, in the following order:

1) Appropriate evaluation instruments are chosen or created to assess student capability in relation to the specific objectives of the program.

2) A variety of suitable instructional techniques and learning experiences are chosen to facilitate learning of the skills and knowledge required to meet the objectives.

3) Instructional resources (texts, films, models, and other learning aids) are selected or created.

READING THE SKILL PROFILE CHART

A skill profile chart (often referred to as a DACUM Chart), is a graphic representation of the essential skills expected of a student graduating from a specific career, vocational or technical program.

Broad areas of employee responsibility are shown in the boxes on the left of the chart. These are called "general areas of competence". The tasks or skills related to each are sequenced along the horizontal track to the right of the general area of competence.

FOR FURTHER INFORMATION

Please contact: Research and Curriculum Development Branch
Post-Secondary Department
Ministry of Education
7451 Elmbridge Way
Richmond, B.C.
V6X 1B8
Telephone: (604) 278-3433

ADDITIONAL COPIES

Additional copies of this chart and performance objectives may be ordered from:

Publication Services
878 Viewfield Road
Esquimalt, British Columbia
V9A 4V1
Telephone: (604) 387-5331